

# The Palmer House Charter:

## Principles for Integrating Environmental Design and Behavior Research into Built Heritage Conservation Practice

This document was drafted at a day-long intensive organized by EDRA's Historic Environment Network at the EDRA42 meeting in Chicago in May of 2011.

### Definitions:

*Environment-Behavior Research:* The use of a wide variety of social science research methodologies to understand how people value and behave in certain natural, cultural, and designed environments. Environment-behavior studies look at how environments change or influence human behavior as well as how people value and perceive environments.

*Participatory Research:* Research that seeks to equalize the power differential between the "researcher" and the "subject" such that the researcher becomes a "facilitator" and the "subjects" are transformed into "co-researchers". In most traditions, it is up to the participants to define what is valid knowledge, what should be researched (e.g., the topic and research question), and how data is gathered and analyzed. When the explicit goals include the empowerment and emancipation of communities to achieve social justice, the term "participatory action research" is used.

*EDRA:* The Environmental Design Research Association is an international, interdisciplinary organization whose purpose is to advance and disseminate environmental design research toward improving understanding of the interrelationships between people and their built and natural surroundings. EDRA's goal is to facilitate the creation of environments that are responsive to human needs. (<http://edra.org>)

*Historic Environment Network:* EDRA's Historic Environment Network was created in 2008 to connect scholars and practitioners with an interest in research that addresses the intersection of environmental perception and valuation with built heritage and cultural landscapes. (<http://www.edra.org/content/historic-environment>)

*Communities of Practice:* Any social structure of order, such as institutions, practitioners, cultural groups, and communities, in which common concerns or interests are shared. Communities of practice can consist of trained, educated experts or everyday people with disparate professional and educational backgrounds.

### 1. Assumptions

- 1.1 This document has been created for members of EDRA, preservation/conservation professionals and policy makers, environmental design professionals/researchers, community members, and the public at large.
- 1.2 Built heritage conservation should benefit people.
- 1.3 Built heritage conservation practice should be substantiated with empirical evidence.
- 1.4 Social science research methods should play a central role in the identification and treatment of the historic environment using the values, perceptions, and experiences of most stakeholders.
- 1.5 Applied social science research can provide empirical evidence to substantiate practice.
- 1.6 Orthodox preservation/conservation doctrine and practice focuses on fabric, not people.
- 1.7 Orthodox practice tends to over-emphasize the values of experts and sideline the values of most stakeholders.
- 1.8 Orthodox practice is difficult to change because it is sustained through fixed legal and doctrinal frameworks.
- 1.9 Spirit of place, sense of place, and place attachment are integral concepts of historical authenticity.
- 1.10 Historical authenticity is multi-dimensional.
- 1.11 Because the meaning of tangible heritage cannot exist independently of human interpretation, then all heritage is, at some level, "intangible".
- 1.12 Participatory research techniques are important in equalizing the power differential between the "researcher" and the "subject".
- 1.13 Cultural heritage is a human right.
- 1.14 The ideas, concepts, and goals in this document are not meant to replace orthodox, fabric-centered preservation/conservation theory and doctrine, but rather to form another perspective that should be balanced with traditional theory and practice.

## **2. Goals**

- 2.1 Cultural heritage should be used to empower communities and foster social justice.
- 2.2 Where feasible, all relevant communities of practice should be treated as equals in the stewardship of the historic environment.
- 2.3 Where feasible, the practitioner/researcher should function as a facilitator between community members and experts in how a broad range of values are used in the identification and treatment of the historic environment.
- 2.4 The natural and cultural environments should be conceived as a continuum and not a dichotomy.
- 2.5 Heritage studies theory should inform built heritage conservation policy and practice.
- 2.6 Environment-behavior and participatory research should be used to help identify historic places, conserve these resources' historical authenticity, and define heritage conservation performance.
- 2.7 Environment-behavior and participatory research should be used to produce better, empirically based arguments for the conservation of the historic environment.
- 2.8 The role of place and environment in significance and authenticity should be emphasized.
- 2.9 The relationship between cultural heritage and spirit of place/place attachment should be explored.
- 2.10 The role of place attachment and the impulse to preserve/conservate should be explored.
- 2.11 The emotional and physical benefits of the conservation of the historic environment (quality of life) should be better understood and articulated.
- 2.12 Policy and practice should change to recognize that the values associated with the historic environment are dynamic.

## **3. Examples of applied historic environment research**

- 3.1 Identifying places that communities believe are "historic" but don't conform to orthodox art/historical values.
- 3.2 How to treat historic buildings and landscapes in a way that maintains desired sociocultural meanings and values.
- 3.3 Understanding the everyday person's experience of the historic environment.
- 3.4 Balancing expert and most stakeholder values.
- 3.5 Understanding the polyvocality of historical authenticity.
- 3.6 Understanding the embodied relationship between the physical age of place and emotional attachment.
- 3.7 Exploring multicultural and extra-Western perspectives of the historic environment.
- 3.8 Informing historical significance with stakeholders' values.
- 3.9 Empirically based design review standards.
- 3.10 How to create arguments to conserve the historic environment based on quality of life and sense of place.
- 3.11 Ways to effectively communicate with most stakeholders using their meanings rather than the meanings of experts.

## **4. Methodological approaches**

- 4.1 Qualitative and quantitative approaches are equally valid, depending on context.
- 4.2 Where feasible, a methodology and associated methods should be chosen based on their fit for a given research question, and not based on the particular discipline of the researcher.
- 4.3 Interdisciplinary research techniques are therefore available from a wide range of disciplines, such as:
  - Anthropology
  - Archaeology
  - Sociology
  - Psychology
  - Philosophy
  - Parks, recreation, and tourism management
  - Architecture
  - Landscape architecture
  - Interior design
  - Planning
  - Natural resource conservation
  - Geography
  - Public history
  - Historic preservation
  - Heritage studies
  - Community development

- 4.4 Any relevant individual or mix of qualitative and quantitative methodologies can be considered, such as ethnography, grounded theory, phenomenologies, participatory research, content analysis, historical (interpretive research), correlational (survey) research, and experimental research.

## **5. Responsibilities**

- 5.1 The EDRA Historic Environment Network will:
  - 5.1.1 Promote environment-behavior and participatory research in built heritage conservation practice.
  - 5.1.2 Work with the EDRA board to better integrate built heritage conservation practice into EDRA's activities.
  - 5.1.3 Investigate ways to promote the ideas in this document to other built environment disciplines, such as architecture, landscape architecture, planning, interior design, and environmental conservation.
  - 5.1.4 Play a leading role in pioneering collaborative opportunities with practitioners and researchers.
  - 5.1.5 Work with built environment educational accreditation programs to promote environment-behavior and participatory research that addresses the historic environment.
- 5.2 Practitioners and researchers that employ environment-behavior and participatory methodologies should seek opportunities to engage in collaborative partnerships with built heritage conservation practitioners.

### **Participants that helped draft this document at the EDRA 42 session in Chicago, IL:**

#### **Organizer:**

Jeremy Wells, Roger Williams University

#### **Presenters:**

You-Kyong Ahn, Calvin College  
April Allen, Michigan State University  
Cari Goetcheus, Clemson University  
Michael Holleran, University of Texas School of Architecture  
Paul Kapp, University of Illinois at Urbana-Champaign  
Sara Kocher, Sara Kocher Consulting  
Christopher Koziol, University of Colorado, Denver  
Daniel Levi, Cal Poly  
Jennifer Minner, University of Texas School of Architecture  
Bryan Orthel, Washington State University

#### **Audience:**

Maria Cristina Dias Lay, Federal University of Rio Grande do Sul (Brazil)  
Wei Zhao, University of Illinois at Urbana-Champaign